



SECTION: Finance	EFFECTIVE DATE: July 24, 2023
RECOMMENDATION NO.: GC123-23	COUNCIL APPROVAL: Res. No. 140-23
SUBJECT: Community Financial Requests	POLICY NUMBER: Budget-Financial-34

1. Scope

- 1.1. This policy applies to all Town departments, committees, and working groups falling within the reporting requirements of the Town of Huntsville.

2. Definitions

The following definitions pertain throughout this policy:

- 2.1. **"Applicant"** means the organization or individual who is submitting application for a community financial request.
- 2.2. **"Community event"** means an organized event within the Town of Huntsville and is open to all members of the public. Events that take place within the District of Muskoka, but not located directly in Huntsville may be considered under special circumstances providing that the event benefits the residents of Muskoka at large.
- 2.3. **"Community Financial Request Program"** means the program created as a result of this policy.
- 2.4. **"Community Project"** means a capital or non-capital project which provides benefits to our community, will be viewed with pride by the community, will

provide public benefit and leave a meaningful legacy.

- 2.5. **“Donations”** means funding or in-kind goods and services provided from an external organization to support a program or event with no expectation of recognition, acknowledgement or other promotional considerations.
- 2.6. **“Financial request”** means a request from a community group that has a direct or in-direct financial impact to the Town. There are many different types of financial requests which have been outlined in section 7 of this policy.
- 2.7. **“Grass root organization”** is a community club or organization, providing a program or service in the areas of inclusion, sport & recreation, and/or art & culture initiatives that support Town of Huntsville residents but may not have charitable designation.
- 2.8. **“Not-for profit”** is a community club or organization registered in Ontario as a non-profit corporation by the applicable provincial or federal authority or ministry;
- 2.9. **“Sponsorship”** means funding or in-kind goods and services provided from an external organization to support a program or event to boost revenue or program offering in exchange for public recognition, acknowledgement, or other promotional considerations.

3. Purpose

- 3.1. From time-to-time, Council members and staff have been approached to provide various types of financial requests from the community. This policy endeavours to provide a process and guidance for determining eligibility and reporting mechanisms for the “Community Financial Request Program”
- 3.2. Requests specifically related to enhancing tourism in Huntsville will be first

directed to Huntsville's designated "tourism entity".

- 3.3. Not-for profit organizations and grass roots organizations, in most circumstances, qualify for a "not-for profit" rate within the Fees and Charges by-law and are not required to make application for those already reduced rates.
- 3.4. Annual funding limits for each type of financial request is outlined in Appendix A. Updates to the limits will be approved through the budget process. Applications will be made on a first come first serve basis provided the application meets the requirements of this policy.
- 3.5. The Community Financial Request Program enables staff to respond to in-year trends and provide support to incubate new recreation and cultural experiences, special events and programs for our community.

4. Funding

- 4.1. The financial impact to the Town varies depending on the type of request from the community. Providing complementary tickets or discount admission is unlikely to result in incremental costs to the Town.
- 4.2. The Town will set a budget for "Community Financial Requests" for both in-kind and direct financial requests through the Town's annual budget.
- 4.3. Community Financial Request applications will be administered by the Economic Development Officer but will be received and approved by the Manager responsible for the area of support requested (see Appendix A).

5. Community Objectives

- 5.1. Applications will be reviewed and awarded based on the benefit to the

community.

5.2. The following considerations will be included in the analysis:

5.2.1. Applicants that provide direct programs, services, or are undertaking a Community Project, Community Event, Special Event or Initiative, that create opportunities which enhance the quality of life and public benefit for Huntsville residents in one or more of the following areas:

5.2.1.1. Arts: Creative activity by professionals or non-professionals in various fine and applied art forms including but not limited to: visual, performing and performance, literary, media and decorative arts;

5.2.1.2. Culture: Beliefs, customs, education, and traditions of certain communities, societies, or cultural groups relating to language, ethnicity, race, gender, sexual identity, disability, religion, class, and diversity;

5.2.1.3. Environment: Beautification, celebration, conservation, documentation, interpretation, preservation, restoration, and research of the environment/natural heritage (air, water, flora, fauna, and natural landscape);

5.2.1.4. Heritage: Identification, documentation, interpretation, celebration, commemoration or preservation of built heritage (structure, building or group of buildings, landscape), cultural heritage (archaeology, archives, genealogy, monuments, museums, and galleries/collections), historic people and events and traditions (customs and beliefs);

5.2.1.5. Recreation: Activities contributing to physical health and well-being including participation in sports leagues, instructional sports, fitness and wellness activities, leisure, and hobby activities;

5.2.1.6. Social Services & Health: Programs and services supportive to the social determinants of health (state of complete physical, mental, and social well-being with a focus on prevention, access to housing, food and clothing, freedom from violence, marginalization and/or discrimination).

5.2.1.7. Economic Development: To provide support to a business or organization for an initiative, event or activity that enhances the quality of life for residents and/or visitors (for example workforce development, attraction, and retention.)

5.2.2. Demonstrate that their programs, services, or opportunities to be created are of significant value to a wide segment of the citizens of Huntsville and may support inclusion in our community.

6. Eligibility of Community Requests

This section outlines the various community requests that are eligible to be considered for funding from the Town of Huntsville, through the Community Financial Request Program.

6.1. Eligible community requests

- Requests that support the community at large, and the public benefit can be demonstrated.
- Requests that do not qualify for Huntsville Municipal Accommodation Tax Association (HMATA) funding.
- Requests for direct financial support (grants), in-kind support, or waiving and/or reduction in user fees as per the Town's Fees & Charges by-law.

- Requests must meet the objectives set out in section 5.

6.2. Requests for multi-year projects can be requested and are subject to budget approval. Funding may be considered under special circumstances and should show significance in the application for a multi-year project.

6.3. Ineligible community requests

- Requests that qualify for Huntsville Municipal Accommodation Tax Association (HMATA) funding.
- Private events (examples: weddings, celebration of life, birthdays, anniversary parties, etc.) or events that support only one individual or family.
- Requests for funding to support a business or commercial activity, unless the business requesting funds is for a specific event outside of their normal operations.
- Events that conflict with the Town's core values, vision or strategic goals or adversely impact the Town's reputation.
- Requests from organizations or businesses not in good financial or professional standing with the Town of Huntsville, or who is engaged in activity that may be deemed by the Town, at its sole discretion, to have a negative impact the Town's reputation,
- Request for funding where the activity duplicates or conflicts with an existing program or activity that is already offered by the Town of Huntsville (Example: outdoor park/dock yoga or fitness class with instructor).
- Requests for on-going annual operational funding.

- Direct charitable donations to an organization that is non-profit or registered charitable organization.
- Events, projects, or organizations that did not fulfill their obligations during previous events or activities for which community financial support was received.
- Funding will not be considered to cover deficits of the Applicant or fund an Applicant's debts.
- Activities that primarily serve the membership or purposes of any one organization.

7. Funding requests

- 7.1. This policy considers the following types of funding requests: waiving of Town fees, promotional and discounted admission, direct financial contributions, and in-kind contributions.
- 7.2. Requests that are not covered by another policy or specifically included in the Town's Fees & Charges by-law may be considered provided the request is consistent with the spirit of this policy and be approved by the relevant Director.
- 7.3. Priority may be given to applicants with new initiatives for the community. Organizations are encouraged to only request one time funding for their program, event or initiative.
- 7.4. Requests will be provided by the applicant in writing on a pre-determined form that will be available on-line and in person upon request.
- 7.5. Waiving of Town fees

- 7.5.1. The Town sets the user fees for the activities, programs, and facilities annually through the Fees & Charges by-law.
- 7.5.2. In general, staff do not have the authority to waive fees at the request of individuals or organizations under the Fees & Charges by-law.
- 7.5.3. Waiving of fees may be requested and approved through this Policy and may include a partial reduction of fees, discount, or a waiving of the full fee.
- 7.5.4. It is acknowledged that there are existing agreements for the reduction of fees for various community groups through Council approved agreements that remain in force and are outside of the limits set in this policy.

7.6. Promotional and discounted admission

- 7.6.1. The Town sets the participant fees for the various programs, admission, tickets, or other similar items (for example: individual pass to Muskoka Heritage Place, family swim pass, and skating pass).
- 7.6.2. Promotional or discounted tickets may be approved and awarded through this Community Financial Request Program and may include a reduction of fees, a discount, or the waiving of the full fee.
- 7.6.3. Staff will give consideration for the impacts on the program, revenue generation, and incremental costs of providing promotional and discounted admission.

7.7. Direct financial contributions

- 7.7.1. Direct financial contributions are funds paid to the applicant to support a specific event or program.

- 7.7.2. Funds will only be paid out upon conclusion of the event or program, unless approved by the Economic Development Officer.
- 7.7.3. Direct financial contributions may include sponsorships paid by the Town. If approved, the Town will enter into written sponsorship agreements with the applicant and/or other external organizations for the exchange of funds, goods or services, in return for public recognition, acknowledgement or other promotional considerations. Any sponsorship arrangements in conjunction with the Town are to contribute towards the costs associated with the program, project, activity, or event that it is meant to support.

7.8. In-kind contributions

- 7.8.1. In-kind contributions can include but are not limited to; the Town providing staff resources at no cost to the applicant for an event, allowing Town-owned facilities (indoor or outdoor) to be used by an applicant for no fee (outside the normal fees listed in the Fees & Charges by-law).

8. Responsibilities

8.1. Senior Management:

- Ensuring managers and staff are adhering to this policy.
- Ensuring that program information is readily available to staff and the public.
- Provide training to staff on this policy.

8.2. Managers:

- Ensuring any requests for community financial requests are directed to the Community Financial Requests Program appropriate application form, and relevant staff lead.
- Tracking all requests granted as required and outlined in Appendix A.
- Ensuring that the approved limits as set out in this report are not exceeded.

8.3. Economic Development officer

- To Administer Financial Request Program.
- To approved and sign any agreements required as a result of the direct financial contribution

8.3.1. Treasurer:

- Assist staff in ensuring that the reporting requirements set out in this policy are adhered to.
- Providing guidance to staff in annual budgets to support the community requests as outlined in this policy.

8.3.2. General Committee:

- In the event the applicant does not feel their request was treated in accordance with this policy, Council may review their application and staff rationale for the denial of the request.

9. General provisions

- 9.1. The Town's fiscal and budget year is January 1 to December 31.

- 9.2. An applicant may make one community financial request per year
- 9.3. If requested, the applicant will provide the Town with financial records relating to the request (event, program, etc.) at no cost to the Town.

10. Reporting Requirements

- 10.1. See Appendix B for sample report
- 10.2. Fees noted as “included in the financial records” will be recorded in the general ledger and included in the Town’s financial reporting to recognize the revenue that would have been realized if the fee was not waived

11. Policy Review

- 11.1. This policy shall be reviewed as deemed necessary by Council.
- 11.2. The Finance Department may update this policy for minor and administrative amendments, should they be required.

Appendix A: Community Funding Annual Limits

Division	Staff Responsible	Authority	Annual Financial Limit	Reporting Requirements
Community Services	Manager of Muskoka Heritage Place	Promotional and discounted admission	\$1,000.00	Annual detailed report
		Archival research fees	no limit	Annual detailed report
		Partial site or limited access rentals at a pro-rated discount	\$2,000.00	Annual detailed report
	Manager of Algonquin Theatre	Promotional and discounted tickets	\$1,000.00	Annual detailed report
	Manager of Customer Service	Promotional and discounted admission	\$1,000.00	Annual detailed report
	Manager of Aquatics	Promotional and discounted admission	\$1,000.00	Annual detailed report
	Manager of Recreation Culture & Heritage	Promotional and discounted admission	\$1,000.00	Annual detailed report
	Director of Community Services	Waiving of Fees	\$5,000.00	Annual detailed report, also included in the financial records.

Division	Staff Responsible	Authority	Annual Financial Limit	Reporting Requirements
Development Services	Economic Development Officer	Direct financial contribution	\$5,000.00 (initial year)	Annual detailed report, also included in the financial records. Limit is in accordance with the annual amounts allocated as outlined in the budget.
		In-kind contribution (for staff costs)	\$5,000 (initial year)	Annual detailed report, also included in the financial records. Limit is in accordance with the annual amounts allocated as outlined in the budget.
	Director of Development Services	Waiving of fees (planning only)	no limit	Annual detailed report. Only when it is deemed it is unreasonable in the circumstance to request the payment
Operations and Protective Services (OPS)	Director of OPS	Waiving of fees (roads and transit)	no limit	Annual detailed report. Only when it is deemed it is unreasonable in the circumstance to request the payment
		Promotional and discounted admission (transit)	\$500.00	Annual detailed report

For illustrative purposes only

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